SOCIETE GENERALE

virtusa
Accelerating Business Outcomes

SocGen PEGA Upgrade 7.2.2 to 8.3

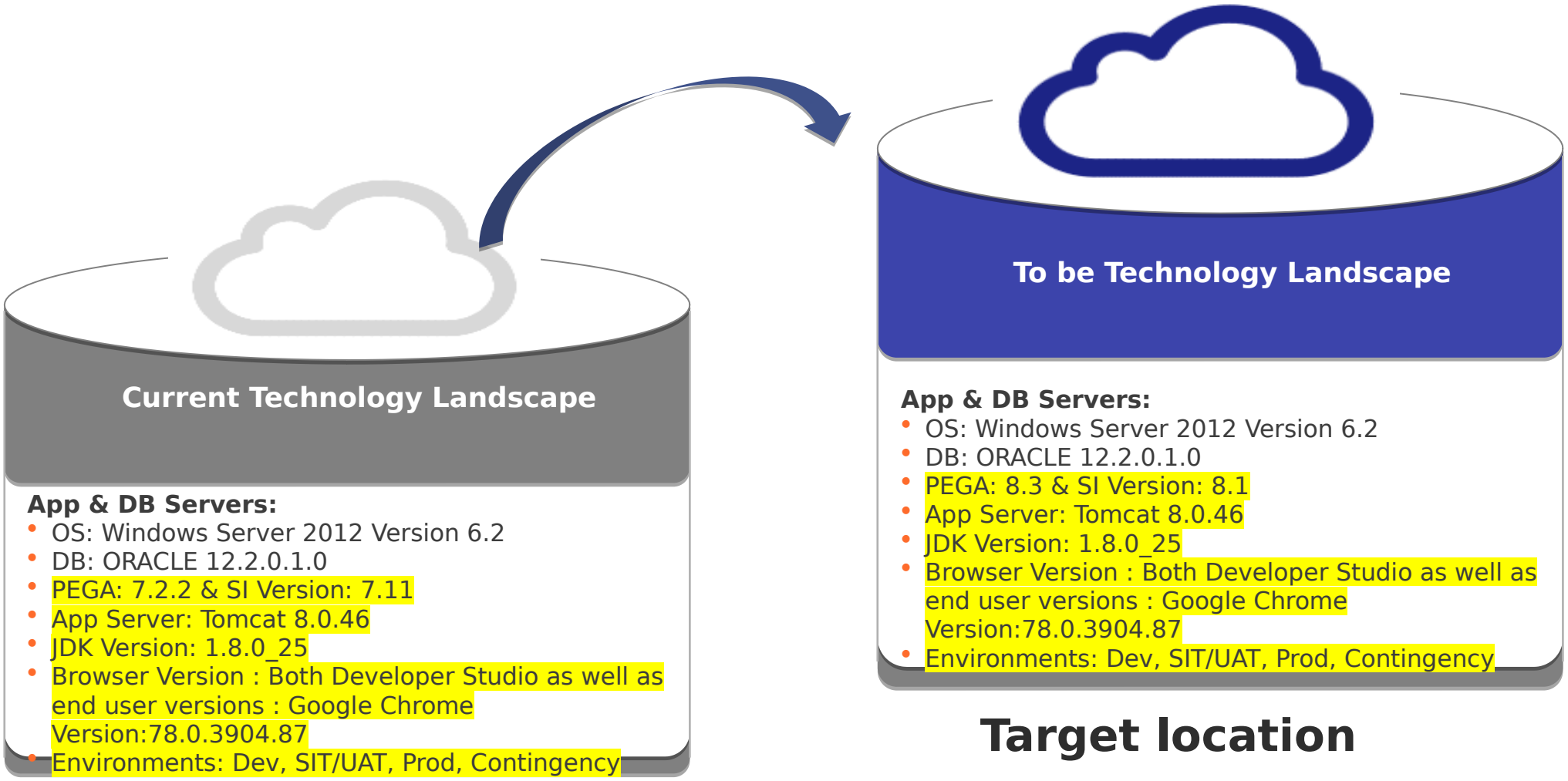
VIRTUSA PROPOSAL

Feb 2020

Agenda

1. Requirement – PEGA Upgrade
2. In Scope / Out of Scope
3. Few Queries
4. Delivery Schedule & Resource Plan
5. Dependencies & Assumptions

Current Technology Landscape vs To Be Technology Landscape


Current Technology Landscape
App & DB Servers:
OS: Windows Server 2012 Version 6.2
DB: ORACLE 12.2.0.1.0
PEGA: 7.2.2 & SI Version: 7.11
App Server: Tomcat 8.0.46
JDK Version: 1.8.0_25
Browser Version : Both Developer Studio as well as end user versions : Google Chrome Version:78.0.3904.87
Environments: Dev, SIT/UAT, Prod, Contingency
Current location
To be Technology Landscape
App & DB Servers:
OS: Windows Server 2012 Version 6.2
DB: ORACLE 12.2.0.1.0
PEGA: 8.3 & SI Version: 8.1
App Server: Tomcat 8.0.46
JDK Version: 1.8.0_25
Browser Version : Both Developer Studio as well as end user versions : Google Chrome Version:78.0.3904.87
Environments: Dev, SIT/UAT, Prod, Contingency
Target location

© 2019 Virtusa Corporation. All rights reserved.

Upgrade of Socgen Smart Investigate from Pega 7.2.2 to Pega 8.3

Project Understanding

SocGen plans to upgrade its Socgen Smart Investigate to **Pega 8.3**

- The current technology stack is built on Pega 7.2.2 SP1 with the Smart Investigate framework
- Position the environment for the future, improve stability and Performance by moving application to latest platform version
- Reduce technical debt carried forward into upgraded 8.3 version, by using latest functionalities with low code integrations and channel improvements like chatbot.
- Increase SocGen collaboration and oversight of project to strengthen partnership

Scope

- Upgrade PEGA 7.2.2 to 8.3. Test applications on Pega 8.3 platform and fix compatibility / compliance issues introduced by upgrade
- Applying all the hotfixes post upgradation. (28 hotfixes in 7.2.2 and same needs to be applied for 8.3)
- Retrofitting of rules with new changes in latest versions so that no miss in new functionalities provided by latest version frameworks
- Socgen Smart Investigate Upgrade 7.11 to 8.2

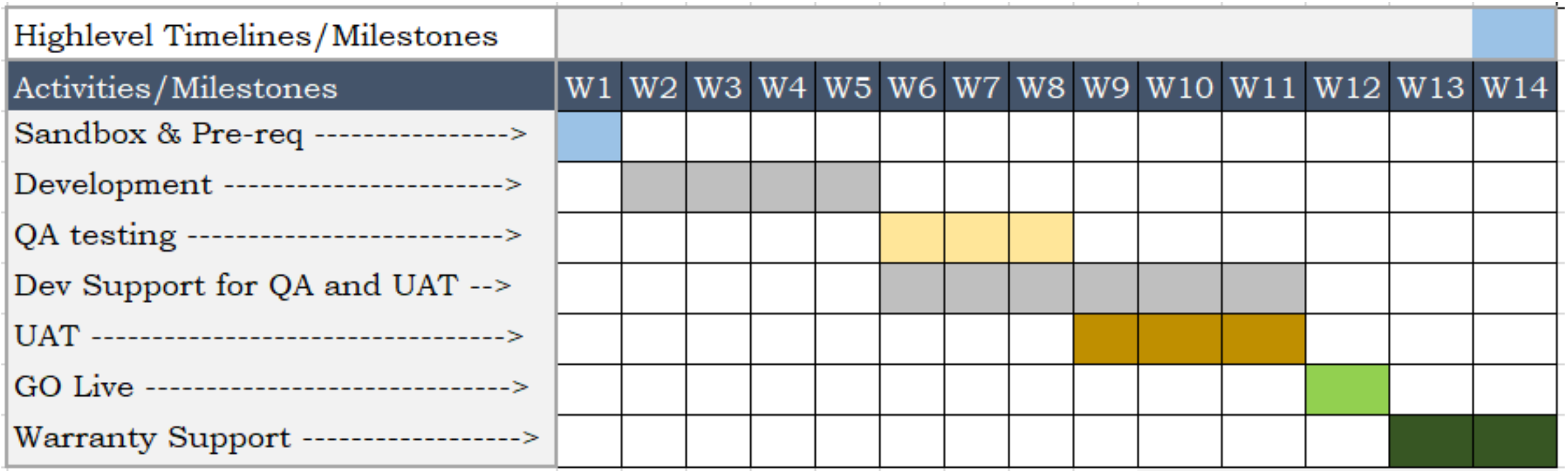
Out of Scope

- UAT will be done by SocGen
- Security Testing
- Performance Testing
- Accessibility Testing
- Pega will fix any potential road blocks to their product (SRs) in a timely manner without impacting the project schedule.

FEW QUERIES

Sr.No#	Query Synopsis
1	Are we expected to resolve the existing warning issues once we shifted on Pega 8.3 upgraded version?
2	How many & what are those languages that we are anticipating for providing complete soultion using NLP?
3	What is the Performance/Acceptance/Expection criteria for email exchange by SocGen?
4	Is there any BOT implementation or automation code required to handle some scenarios like sending an email every minute from same email id or different IDs? (Requirement like - 1. Open Excel file. 2. Copy email address to column 3. Open Gmail 4. Compose 5. Insert Email address in email column 6. Add Subject 7. Attach File from a Path on local file directory)?
5	SMTP Gateway - what is existing flow in SocGen while sending to or receiving email from outside their own systems?
6	Are planning to automate the BIX extract to write directly into external DB to avoid the failure on the job move between server?

DELIVERY SCHEDULE & RESOURCE PLAN



Role	Location	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10	W11	W12	W13	W14	Total Weeks	Hours	PDs
LSA	Onsite	1	1	1	1	1	1	1	1	1	1	1	1	1	1	14	560	70
SSA	Offshore	1	1	1	1	1	1	1	1	1	1	1	1	1	1	14	630	70
SA	Offshore	0	1	1	1	1	1	1	1	1	1	1	1	0	0	11	495	55
QA Lead	Offshore	1	1	1	1	1	1	1	1	1	1	1	0	0	0	11	495	55
Project Manager	Offshore	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0	0	6	270	30
		3.5	**4.5**	**4.5**	**4.5**	**4.5**	**4.5**	**4.5**	**4.5**	**4.5**	**4.5**	**4.5**	**3.5**	**2.0**	**2.0**	**56**	**2450**	**280**

LSA will be not be required during Warranty Support activities

Team Profile

Role	Synopsis	Utilization	Source
Project Manager	Work for the full duration of the project. This person will work closely with the SocGen Project Manager. This person has a strong background with Agile and Integrative projects. This person helps coordinate the Virtusa off-shore activities, with the blended on-site team. They also work with the Virtusa Client Partner in terms of tracking and maintaining project commercials. This person sits at the right hand of the SocGen Project manager to help set expectations within Virtusa and SocGen and resolve project impediments and mitigate dependencies.	50%	Virtusa
LSA	A Lead Systems Architect with deep knowledge of Pega7 Application design and development best practice. The individual(s) will have worked on several upgrade projects in the past	100%	Virtusa
SSA	A Pega7 developer with extensive upgrade experience who specializes in the refactoring of the UI. This individual would work closely with the Product Managers and UI representatives to work out the best OOTB replacements for previously customized UI controls	100%	Virtusa
SA	A Pega7 developer who is able to help drive the process of refactoring the applications in terms of both UI retrofit and end to end integration testing	100%	Virtusa
QA Lead	A Pega7 developer who has a focus on QA testing. These individuals will review and adjust regression test cases to reflect the refactored application and work closely with SocGen staff as part of the end to end application testing.	100%	Virtusa

© 2019 Virtusa Corporation. All rights reserved.

Key Assumptions and Deliverables

- Estimates are based on the size of the applications at the time of assessment. Additional development introduced before the upgrade project begins may change costs.
- Environments with fully functional application and all pre-requisites will be in place prior to start of the engagement.
- Access to systems for entire Virtusa team will be provide according to project timeline
- Data and Database Support by SocGen for Providing Test Data, Performance tuning, Database Backup's, Managing DB servers
- Technology administrative activities like managing application servers and interface will be done in a timely manner as per timeline
- Test automation, Accessibility, Security and Performance testing is out of scope and will not be conducted by Virtusa
- Custom code not found during
- SocGen will share existing test cases to Virtusa QA team
- Code freeze will be in effect when the application is in UAT (2-weeks)
- UAT and warranty is planned for 2 week duration each
- SocGen will need to make resource allocations to support project as per the project timeline
- Any system downtime experienced will directly impact the project timelines and may initiate a change request (CR). E.g. Network firewall issues, VPN Access, Web Services, SOAP Services, Database connectivity Issues, system slowness, etc.
- Pega will fix any potential road blocks to their product (SRs) in a timely manner without impacting the project schedule.
- Estimate does not include effort from SocGen Infrastructure Team, i.e., App Team, DBA team, etc.

Virtusa shall produce following deliverables during the engagement

- Software Release / Build
- QA Test Plan
- Updated QA Test Cases
- QA Test Results
- Project Plan
- Project Status Reporting

THANK YOU

© 2019 Virtusa Corporation. All rights reserved. Virtusa and all other related logos are either registered trademarks or trademarks of Virtusa Corporation in the United States, the European Union, and/or India.
All other company and service names are the property of their respective holders and may be registered trademarks or trademarks in the United States and/or other countries.

© 2019 Virtusa Corporation. All rights reserved.